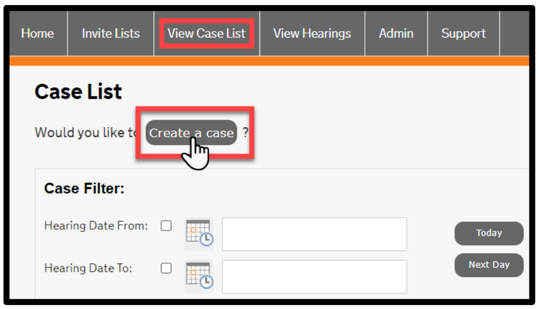
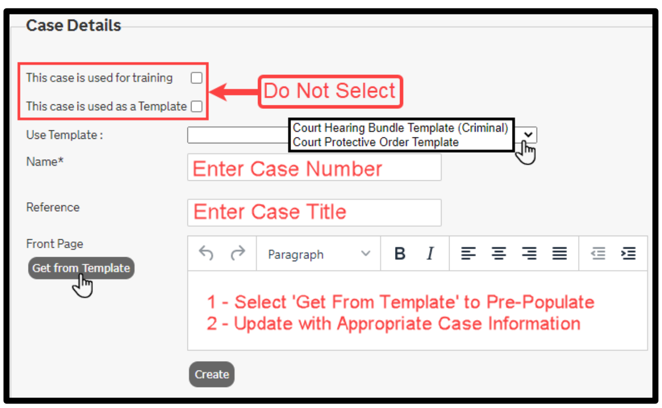
Digital Evidence
Creating Cases Using a Template, Updating Bundles/Sections, and Inviting Case Participants

1. **Create a Case** *(to update the Placeholder Bundles/Sections for an existing case, skip to #2)*
   Note: *a Local Client Admin user must have provided the user with access/rights to create cases*

   a. Select **View Case List** > Select **Create a Case**





   i. **Use Template:** available templates appear in a dropdown menu – **make a selection**

   ii. **Name:** enter the **Case Number**

   iii. **Reference:** enter the **Case Title**

   iv. **Front Page:** *this will be the coversheet for the exhibit list*

      A. Select the **Get from Template button** to pre-populate information from the template, and **add the appropriate case-specific information**, such as case number, party names, attorney names, hearing type, and the judge's name

         1. *The pre-populated information is fully modifiable, and if necessary, the template can be modified by a clerk/court user that has been provided access to the template*

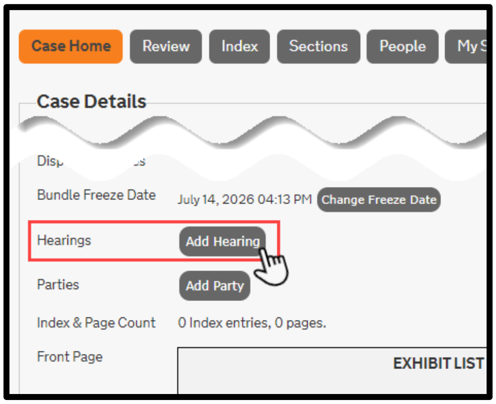
         2. **QUICK TIP:** **copy the hearing type**, to paste into note/name fields when updating the case details with the hearing information and when updating Bundles/Sections

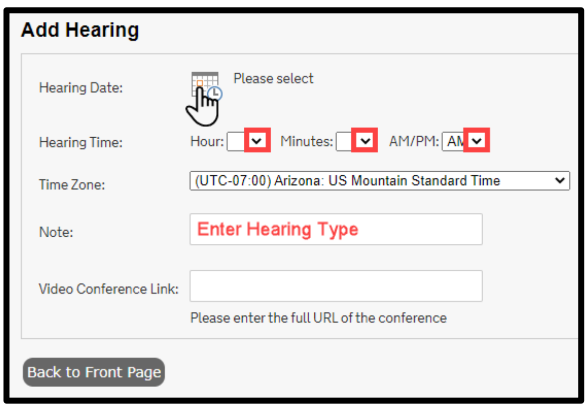
   v. Select the **Create button** to create the case

2. Update the Case Details with the Hearing Information

Note: *this page opens after the case is created, and it is accessible from the Case Home tab*

a. Select the **Add Hearing button** to add the hearing type, date, and time





i. **<u>Hearing Date</u>:** select the **calendar icon** to select the hearing date

A. *This provides the ability to filter cases within the Case List by hearing date*

ii. **<u>Hearing Time</u>:** select the hearing time from the **dropdown menus**

iii. **<u>Time Zone</u>:** ensure that the time zone is **Arizona**

A. *To update the default time zone: access* ***Account Details > Change Details >*** *Select (UTC-07:00) Arizona: US Mountain Standard Time from Dropdown Menu* ***>*** *Select Save*

iv. **<u>Note</u>:** enter the **Hearing Type**

A. (quick tip in #1) paste the hearing type

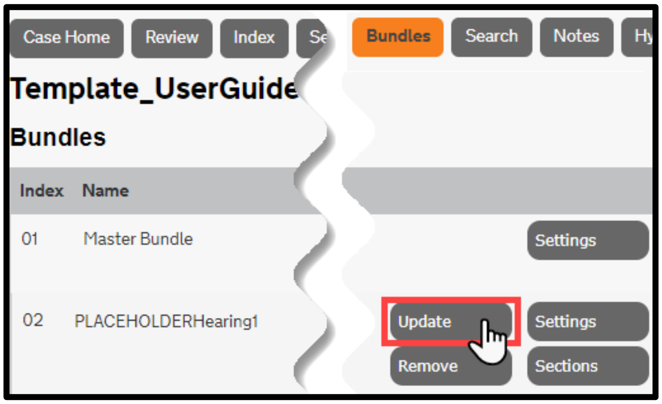
B. ***For subsequent hearings****, ensure that the* ***Front Page*** *information has also been updated with the* ***current hearing type***

v. **<u>Video Conference Link</u>:** if applicable, **add the link** to access the virtual hearing

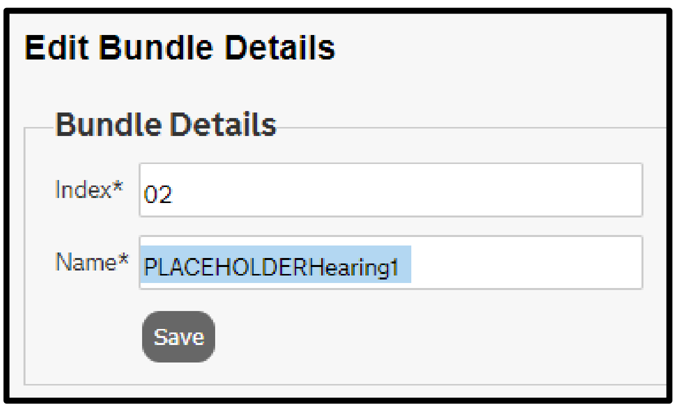
vi. Select the **Back to Front Page button** to save the changes

3. **Update the Appropriate Bundle and Sections to Reference the Hearing -** *Placeholder Hearing Bundles and Sections are automatically created when the case is created using a template*

   a. Select the **Bundles tab** **>** Select the **Update button**



      i. Update the Name of the Bundle



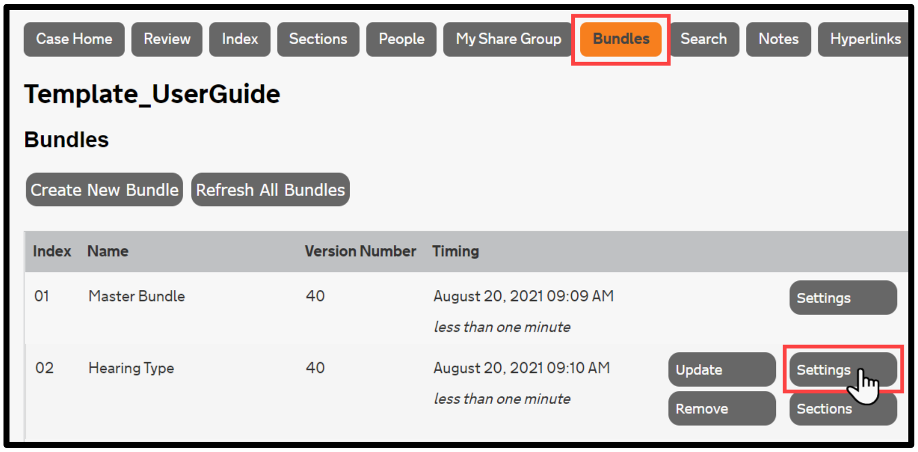
         A. **Name:** Enter the **Hearing Type**

            1. *DoubleClick within the field to highlight the Placeholder Name*

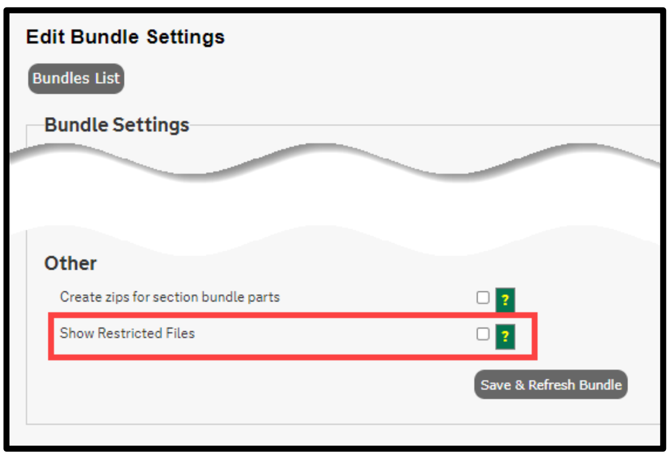
            2. (quick tip in #1) paste the hearing type

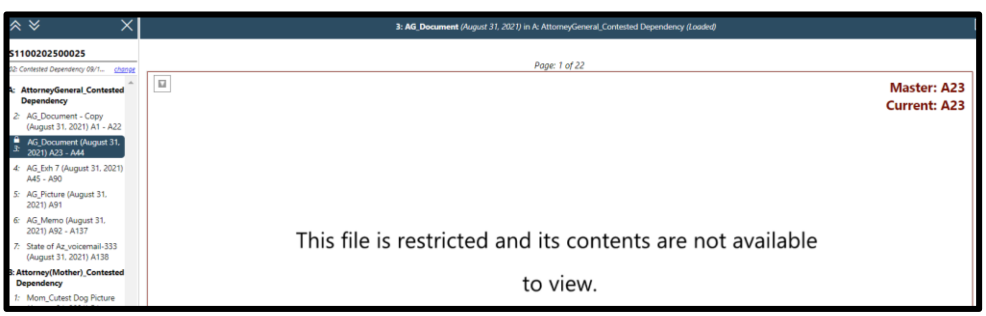
         B. Select the **Save button** to save the changes

ii. If needed, select the **Settings button** to modify the 'Show Restricted Files' configuration

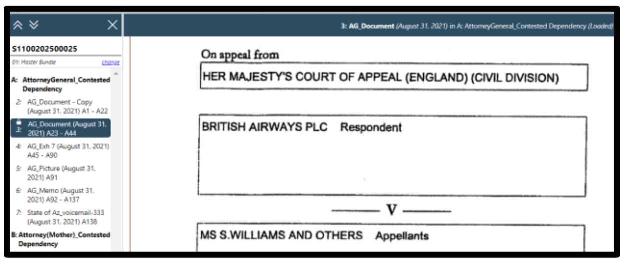


A. The **default configuration (box unchecked) will NOT display restricted exhibits** in Review Evidence mode; **only modify this setting in accordance with local policy**

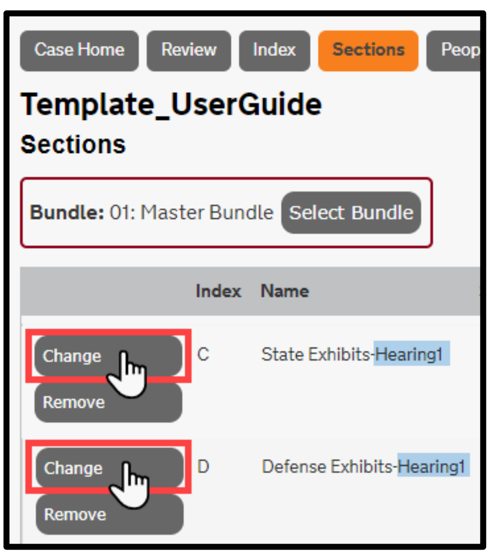




B. If the configuration is modified to **'Show Restricted Files' (check marked)**, any **restricted exhibits WILL DISPLAY** in Review Evidence mode; **only activate this setting in accordance with local policy**

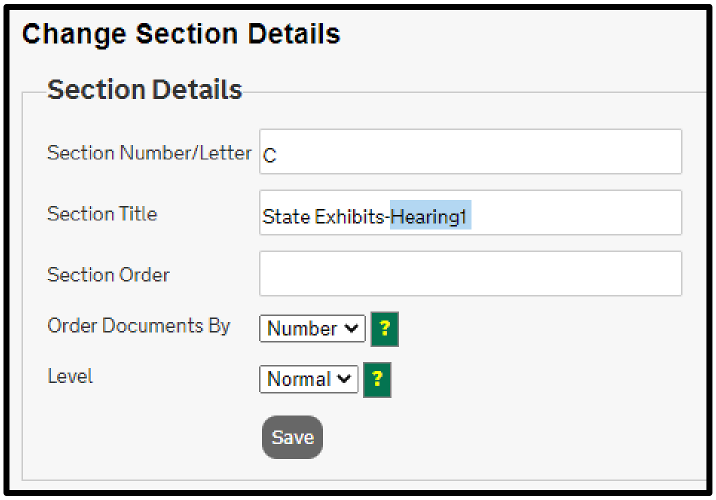


b. Select the **Section tab** to Update the Section Titles
Note: *the ability to update the section titles is only available when accessing the sections from the master bundle (see screenshot below)*



i. Ensure that the **Section Placeholder Title** being updated **matches** the **Bundle Placeholder Name** that was updated

ii. Select the **Change button** to modify the Section Title
Note: *There is one section for each side of the case, and each section must be updated*



A. **<u>Section Title</u>**: Enter the **Hearing Type**

1. *DoubleClick within the field to highlight the Placeholder Name*

2. (quick tip in #1) paste the hearing type

3. **Do NOT remove** the portion of the Title that identifies the party that will upload into a section, such as **State/Defense Exhibits** or **Plaintiff/Defendant Exhibits**

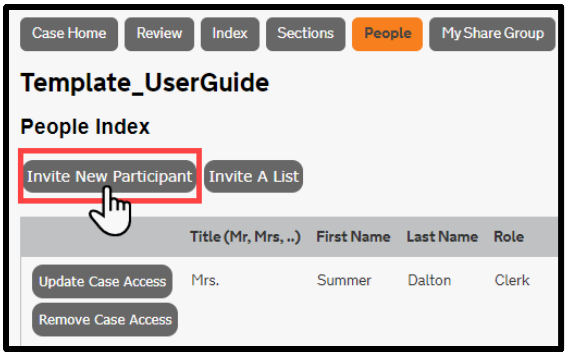
B. Select the **Save button** to save the changes

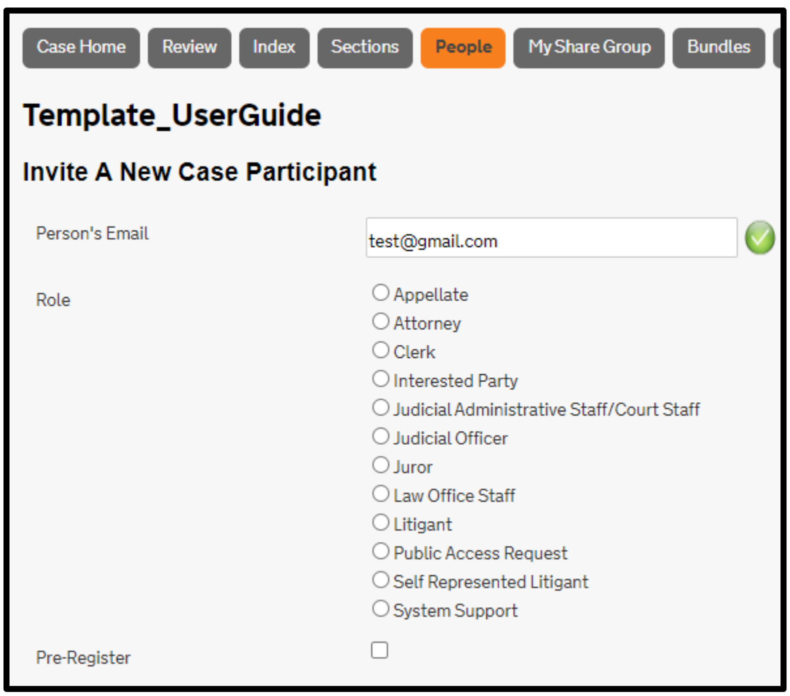
iii. **Repeat this step until all relevant Sections have been updated**

c. Continue to #4 to invite case participants and/or continue to #5 to provide existing case participants with access to the bundles/sections

4. **Invite Case Participants to add the attorneys/parties to the case** – *all users included in the template will automatically be invited and have access to the case and placeholder bundles/sections when the case is created*

   a. Select the **People tab** > Select the **Invite New Participant button**
   Note: *participants must be added to the case one at a time (four screenshots below)*



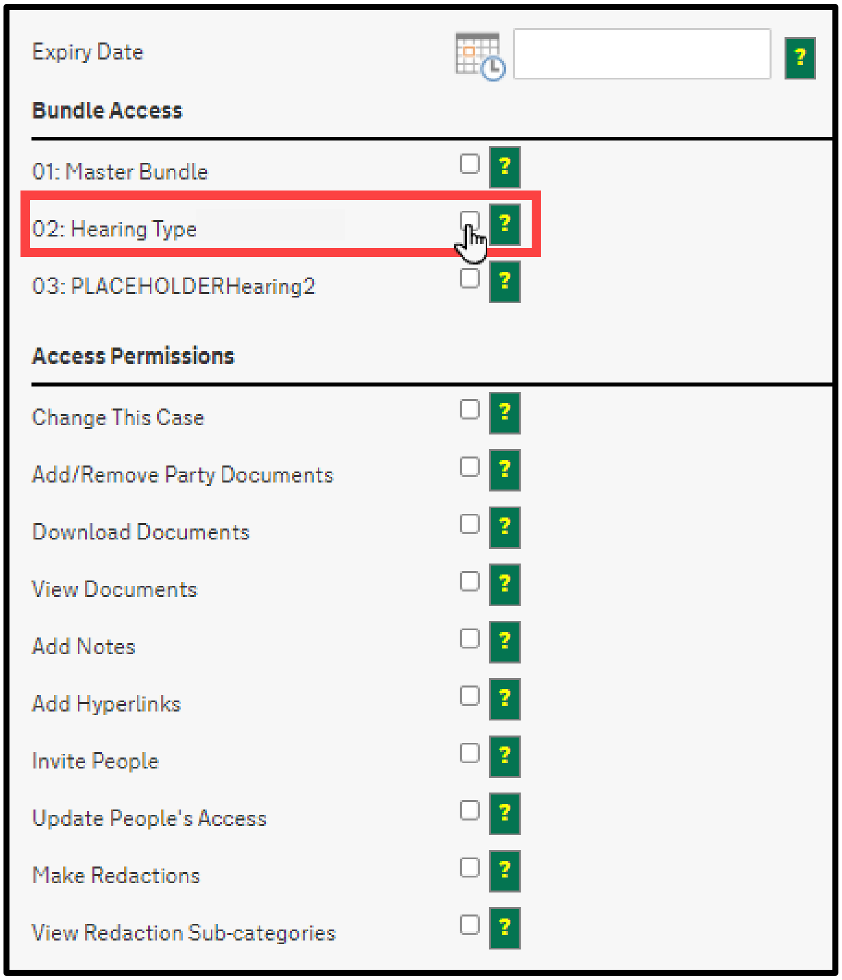


   i. **<u>Person's Email</u>:** enter the **participant's email address**

   ii. **<u>Role</u>:** select the **appropriate role** for the user

      A. *<u>If the user has already registered a user account</u>, then the Role will automatically be selected*

   iii. **<u>Pre-Register</u>:** leave unchecked



iv. **<u>Expiry Date</u>:** to provide limited-time access, select the calendar icon to choose the date that the user's access to the case will expire, <u>or</u> **leave blank**

v. **<u>Bundle Access</u>:** select the **box related to the appropriate Hearing Bundle**

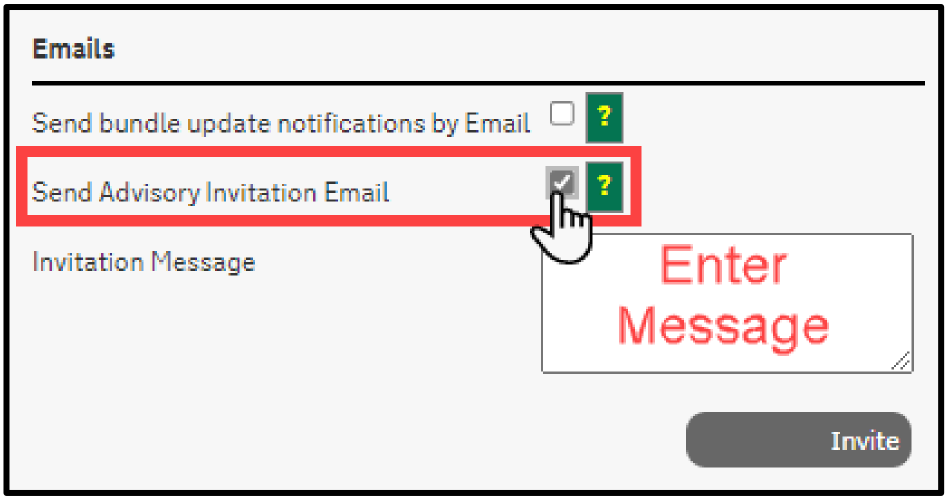
  A. **<u>Master Bundle access should ONLY be provided to clerk/court users</u>**

  B. DO NOT provide access to Placeholder Hearing Bundles

vi. **<u>Access Permissions</u>:** will be automatically selected based on the user's Role

  A. Additional permissions may be provided, but **"Change This Case" and "Update People's Access" should ONLY be provided to CLERK/COURT users**

  B. Auto selected permissions can be removed, if needed



vii. **Emails:** select **"Send Advisory Invitation Email"** to send a notification to user

A. In the **textbox**, provide guidance on the court's policy

1. *Example: Please upload all of your evidence at least 2 days prior to the hearing/trial*.

2. If the text box is not visible, deselect and reselect "Send Advisory Invitation Email"

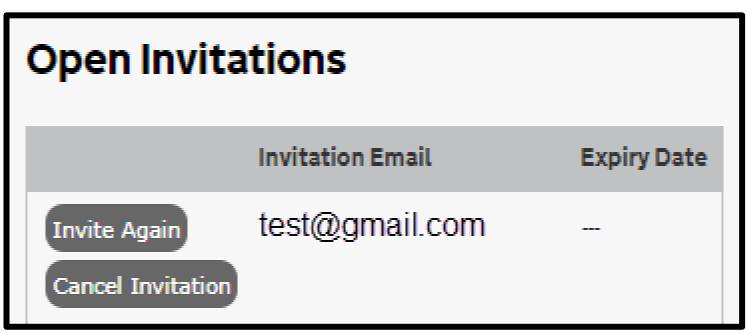
3. If the invited user has opted-out of receiving invitation emails, the court user will see a message indicating that the user had opted not to receive advisory emails, and the court cannot override

B. **Do NOT select** the option "Send bundle update notifications by Email"

viii. Select the **Invite button** to complete the invitation process

ix. **Repeat this step until all attorneys/parties have been invited to the case**

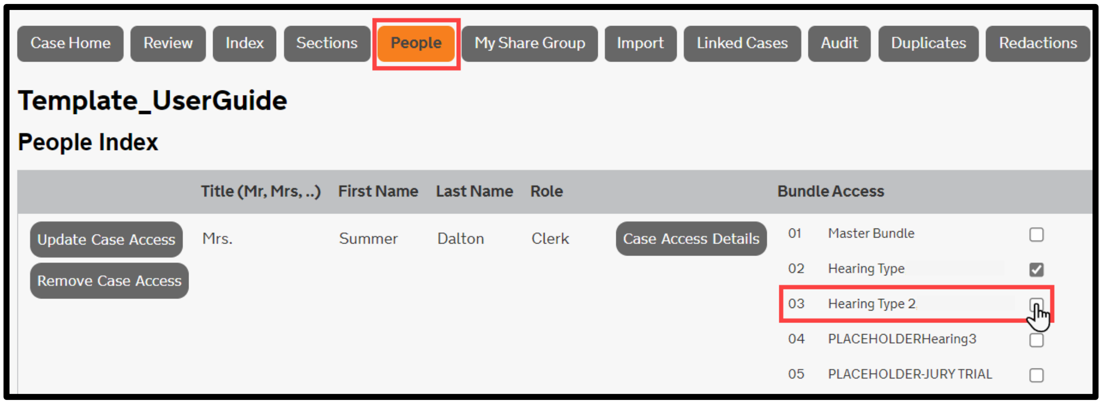
b. **Open Invitations will appear at the bottom** of the Participant List on the **People tab** - *an invitation is considered open when an invited user has not registered for an account*



i. The invitation may be resent or cancelled by selecting the appropriate button

5. Provide an Existing Case Participant with access to Hearing Bundles/Sections

a. All users with access to a case appear within a list under the **People tab**



b. **To provide/remove access to a Hearing Bundle, locate the user and select the appropriate box to add/remove a checkmark** - *a __**checked box**__ indicates that the user has been granted access and an __**unchecked box**__ indicates that the user does not have access*

   i. <u>When access is being provided</u>, users will automatically have access to the Sections within the Bundle

   ii. <u>**Changes will be automatically saved**</u> when a box is checked or unchecked

c. **Repeat this step until all case participants have been given access to the appropriate Hearing Bundle**